**Purpose:**

This procedure provides instructions for printing the daily operations reports that help manage inventory, track samples, and determine blood utilization. These reports are accessed through Smart Term, in the Roll and Scroll function, and not in the GUI function in Sunquest.

**Procedure:**

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| **Report Definitions:** | | |
| **1** | **Expired Crossmatch List** | * Printed daily to determine which crossmatches need to be extended or released. The list is used as a reference for removing unit tags from the units. If a crossmatch needs to be extended, use Blood Order Processing to update the expiration period (EXX). After all updates are completed, use BEC (Release Expired Crossmatches) function to release the units. The system then changes the unit status from allocated (AL) to released (RL) and returns the units to inventory. |
| **2** | **Expired Blood Product List** | * Printed daily to determine which products (if any) have expired but have not been removed from inventory. |
| **3** | **Issued, Unreported Units List** | * Printed daily to determine if any units remain in an issued status, but have not been moved to Final Issued. |
| **4** | **Pending Log** | * Patient/Unit Pending Log is a list of patient orders with incomplete patient/unit testing |
| **5** | **Allocation Report** | * List of currently allocated units. |
| **6** | **Inventory Summary Report** | * All units in inventory, by status, component, group and type. |
| **7** | **QA Report** | * List of all QA failures. |
| **9** | **Patient/Unit Pending Log** | * Lists all accession numbers in which units allocated and/or issued exceeds units ordered |
| **Step** | **SQ Function** | **Action** |
| **1** | **Expired Crossmatch**  **List** | * Print and review the Expired Crossmatch List (BBR option 1). * Log into SmarTerm, and enter BBR. * Select “0” for printer to view on screen, or choose SQ printer. * Select option 1: Expired Crossmatch List * At Hospital ID prompt, enter “H” * Hit ENTER again to accept. * (ENTER is the default for most prompts) or enter “??” for choices to appear. * Enter A to accept. * At “Location” prompt, Hit Enter, then A to accept. * Print and review the list, updating any that are appropriate. |
| **2** | **BEC** | * Hit ENTER again at the Printer Prompt, and return to Main Function Prompt * Enter BEC * At “Hospital” prompt, Enter “H” * Enter to Accept. * At “Location” prompt, RETURN through to default to all. * Hit ENTER to Accept. * Screen prompt: “expired crossmatches to be released for hospital(s) Harborview Medical Center”. * At the “Confirm (Y/N) prompt, do one of the following: * Enter Y to release all crossmatches for HMC * Enter N or Press RETURN for the N default to cancel the action. |
| **3** | **Expired Units List** | * Log into SmarTerm and in Function prompt enter BBR * Select “0” to view report on screen, or chose printer number. * Select option 4 (Expired Products List) * At “Hospital” prompt, ENTER H * Whenever you are unsure of an answer, hit ENTER to default, or enter ?? for prompts to appear. * Hospital Selected will show as “H”. Enter A to Accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept. * Print and review expired products list. Physically resolve by locating and finalizing unit status. * Report any discrepancies to TSL manager or Lead. |
| **4** | **Issued, Unreported Blood Product List** | * Log into SmarTerm and in Function prompt enter BBR Select “0” to print to screen, or chose appropriate printer. * Select Option 5. (Issued, Unreported Blood Products) * Enter H at Hospital prompt. Enter A to accept. * Whenever you are unsure of an answer, hit ENTER to default, or enter ?? for prompts to appear. * Hospital Selected will show as “H”. Enter A to accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept. * Print and review the IUL. Units not transfused or any units that should not be changed to “Issued, Final” must be changed to appropriate status before running function BIF (Blood Issued Final) which puts all issued units as final transfused, and charges them. |
| **Step** | **SQ Function** | **Action** |
| **5** | **BIF** | * Log into SmarTerm and in Function prompt enter BIF * Enter BIF * Enter H at Hospital prompt * Enter A to accept*.* * Whenever you are unsure of an answer, hit ENTER to default, or enter ?? for prompts to appear. * Hospital Selected will show as “H”. Enter A to Accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept * The following prompt is displayed: “Blood Product Unit Issues to be finalized. * Confirm (y/N)” * Enter Y or N as appropriate. * High Priority messages: * BB Blood Product Issue Finalization Started. * BB Blood Product Issue Finalization Completed. |
| **6** | **Pending Log**  **(PL)** | * Log into SmarTerm and in Function prompt enter PL. * Select “0” to Print to Screen or enter printer number. * Use Yesterday’s date as start date, and end date with current time, or use dates as appropriate for your needs. * Accept the default response for the following prompts: preliminary results, AD comments, rack numbers, expanded comments, include CID data. * At the (A)ll (R)eceived (U)nreceived prompt enter R * Enter H for hospital ID * ENTER HBBG for Worksheet(s). * Press enter until you see “accept” and press enter again to print the report |
| **7** | **Inventory Summary Report** | * Log into SmarTerm and in Function prompt enter BBR. * Select “0” to Print to Screen or enter printer number. * Select Option 13 (Inventory Summary)   + Enter H at Hospital prompt   + Enter A to accept*.*   + Whenever you are unsure of an answer, hit ENTER to default, or enter ?? for prompts to appear.   + Hospital Selected will show as “H”. Enter A to Accept.   + At Component/Type/Group prompt, return through to default to all. |
| **Step** | **SQ Function** |  |
| **7 cont.** | **Inventory Summary Report cont.** | * Enter A to accept.   + Units will be listed in categories by status and by component type and group and type.   + Reconcile against physical counts.   + Use BBR 20 to research discrepancies.   + To print Auto and Directed units, use BBR 20.   + Enter “0” to print to screen, or printer number.   + Select option 20 (Auto/Directed)   + Enter H at Hospital prompt   + Enter A to accept*.* * Whenever you are unsure of an answer, hit ENTER to default, or enter ?? for prompts to appear. * Hospital Selected will show as “H”. Enter A to Accept. * At Component/Type/Group prompt, return through to default to all. * Enter A to accept. * Prompt will ask for Status. Return for default of all and * Enter A to accept. * Screen will display your request for all components and statuses available. * Enter A to Accept. |
| **8** | **QA Report** | * Log into SmarTerm and in Function prompt enter BBR. * Select printer number to print. * Enter 7 for report to run. * Select H for HID and RETURN. * Enter A for Accept. * At “Type of Report” prompt, Enter F for Full Report. * The start date is required. Enter T for today or if applicable, run a range with T-7 for weekly, etc. * Leave for Manager review. |
| **9** | **Patient/Unit Pending Log** | * Log into SmarTerm and in Function prompt enter BBR. * Enter printer number or enter “0” to view on screen. * Enter 14 for Report to run. * Select H for HID and return again. Then use A to Accept. * Next prompt is the worksheet to run. Enter HBBG. Return again and A to accept. Select #3 for By Unit Number. * Resolve all listed discrepancies between Units Ordered (UO) and Units Allocated (UA). |

**References:**

Standards for Blood Banks and Transfusion Services, Current Edition. American Association of Blood Banks. AABB Press, Bethesda, MD.

Blood Bank User Guide, Misys Laboratory